Department/Division Name

Scheduling Procedure

Revision <1.0>

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1. Introduction

1.1 Purpose

To provide a common approach to the generation, storage, maintenance and retrieval of project schedules.

1.2 Scope

The procedures defined here are applicable for projects in excess of 50 person-days of effort.

2. Staffing

2.1 Roles and Responsibilities

Typical roles in the Scheduling Procedure might include:

- Project Manager – Responsible for overall project
- Quality Manager – Responsible for defining the method for storage and retrieval of schedules and related planning data.
- Project Oversight Committee – Responsible for approving all project schedules.
- Project Team – Responsible for conformance of this procedure.

3. Procedure

3.1 Estimate Project Schedule

Derive the project schedule from the project size and effort estimates. Methods of calculating this information include the WBS, Lines of Code (LOC), Function Point Analysis (FPA), analogy and Constructive Cost Modeling (COCOMO). Select a method most appropriate for the project type and size.

3.1.1 Estimating the Project Schedule using the WBS

- Select the work breakdown structure appropriate for the selected project life cycle (e.g., Waterfall, Incremental Release, etc)
- Enter the WBS into a tool like Microsoft Project. Enter a project start date to allow the tool to begin laying out the project work onto a calendar.
- Break down the work in to individual activities and tasks.
- Assign effort and resources to each low-level task. The tool you are using should translate effort and resource availability into calendar duration for each task.

Alternatively, you may wish to directly enter an estimated duration for each low-level task.

- Account for vacation time, training time, statutory holidays, and unproductive time.

Estimates should be obtained using more than one method and, where possible, using more than one person/group.

3.2 Storage

All project schedules and the information used in generating the schedules should be passed to the Project Manager for storage in the project file.

3.3 Approval

Project schedules must have the approval of the Project Manager and the Oversite Committee prior to their use in the Project Plan and prior to being stored in the project file. All assumptions made in deriving the schedules are also reviewed and agreed on.

3.4 Update

When schedules are updated, after being logged into the project file, a new version number must be used to identify it and a summary reason for the change must be indicated. The Project Manager will decide whether the old schedule should be retained or discarded.

3.5 Format and Content

The schedule is presented in the form of a Gantt Chart. The schedule is broken down according to the life cycle phases, as defined in the Project Plan. The schedule must also reflect the WBS which fits the selected life cycle. Project milestones are also shown on the schedule.

Versions of the schedule for the same project should use the same format wherever possible.

3.6 Develop Resource Matrix

To assist in assigning human resources to tasks, develop a matrix which shows the roles or skills needed for the project, their percentage of time needed and the time frame they are available to work on the project.

3.7 Create Project Schedule

The overall project schedule, showing project phases and duration can be represented using a Gantt Chart.

To create the schedule, determine the percentage effort in each of the phases, using the data from resource matrix and using historical data from past projects.

Applying these effort estimates to the overall resource matrix will result in a schedule showing project phases, start dates, and end dates.